

Message Text

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UNCLAS SECTION 1 OF 4 BERN 1244

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SUBJ: FY 79 COUNTRY COMMERCIAL PROGRAM - SWITZERLAND

REF: STATE 118, 62483, 77 BERN 1374

1. BEGIN SUMMARY: POSTS IN SWITZERLAND FORTUNATE IN HAVING AMBASSADOR WHO TAKES AN EXTREMELY ACTIVE DIRECT ROLE IN CCP TRADE AND TRAVEL PROMOTION ACTIVITIES AND WHO, IN LAST 6 MONTHS, HAS LAUNCHED, AND DIRECTED SEVERAL PERSONAL INITIATIVES WITH STRIKING RESULTS. THIS MESSAGE, ACCORDINGLY, WHILE EXPANDING ON GENERAL LINES OF PRELIMINARY FY 79 CCP SET FORTH IN BERN REFTEL, ALSO REFLECTS ADDITION OF AMBASSADORIAL INITIATIVES IN CAMPAIGNS FOR TRAVEL PROMOTION, REVERSE INVESTMENT, AND NEW PUBLICATIONS. WITH RESULTANT SHIFT IN EMPHASIS, TWO PREVIOUSLY ENUMERATED CAMPAIGN THEMES GIVEN LOWER PRIORITY AND CERTAIN OTHERS ACCORDED HIGHER PRIORITY. PROGRAM OUTLINED IN FOLLOWING SECTIONS ALSO ENVISAGES GREATER PARTICIPATION IN AMBASSADORIAL CONTRIBUTION TO CCP BY ECON/COMMERCIAL STAFF AT CONZEN ZURICH. END SUMMARY.

2. HERewith RECOMMENDATIONS OF EMBASSY BERN ON SECTIONS I, III, AND IV OF FY 79 COUNTRY COMMERCIAL PROGRAM.
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3. SECTION I: OVERVIEW: AFTER THE DEEP RECESSION OF 1975 AND RELATIVE STAGNATION OF 1976, THE SWISS ECONOMY SUBSTANTIALLY IMPROVED IN 1977 WITH 4.3 PCT REAL GROWTH IN GNP TO SF 152.4 BILLION. SWISS FOREIGN TRADE VALUES REACHED RECORD LEVELS IN 1977, WITH EXPORTS RISING DESPITE THE HIGH SF RATE BY 13.8 PCT

TO SF 42.15 BILLION AND IMPORTS UP 16.7 PCT TO SF 43.02 BILLION. THE SF ROSE 20.3 PCT AGAINST DOLLAR IN 1977 AND BY 17 PCT ON A TRADE-WEIGHTED BASIS. INCREASED COST OF SWISS EXPORTS IN FOREIGN CURRENCIES, COMBINED WITH CONTINUING STRUCTURAL PROBLEMS IN KEY EXPORT INDUSTRIES AND PROSPECT OF SLOWER GROWTH IN FOREIGN DEMAND FOR SWISS PRODUCTS HAVE LED TO PESSIMISTIC GROWTH FORECASTS IN 1978. MOST FIRMS REPORTED THIN PROFIT MARGINS AT END OF 1977. NEW CONSTRUCTION IS STILL DECLINING. CONSUMER PRICE INDEX INCREASED 1.3 PCT IN 1977. OUR SHARE OF IMPORT MARKET SLIPPED FROM 6.8 PCT IN 1976 TO 6.7 PCT IN 1977, ALTHOUGH SHIPMENTS WERE UP BY AS MUCH AS 14.6 PCT OVER YEAR TO SF 2.88 BILLION.

FORECAST: ECONOMIC SITUATION DOES NOT SEEM TO BE IMPROVING, BUT EVIDENCE IS INCONCLUSIVE. EXPORTS IN 1978 ARE EXPECTED TO GROW AT HALF RATE OF 1977. REAL GROWTH IS FORECASTED AT ONLY 1 TO 2 PCT IN 1978. SWITZERLAND IS SITE OF SOME \$5.4 BILLION OF AMERICAN DIRECT INVESTMENT, WHILE SWISS DIRECT INVESTMENTS IN US AMOUNTED TO NEARLY \$3 BILLION AT END OF 1977. SWISS RESIDENTS RANKED 11TH IN ARRIVALS TO US, WHILE IN SWITZERLAND, AMERICANS RANKED SECOND IN ARRIVALS. MAJOR US COMMERCIAL OBJECTIVES IN SWITZERLAND ARE:

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- (1) INCREASE US EXPORT TO SWITZERLAND
- (2) BOOST SWISS TRAVEL TO US, AND
- (3) ASSIST AND FACILITATE SWISS DIRECT INVESTMENT IN US.

IN ORDER TO CARRY OUT THESE OBJECTIVES PRIMARY ATTENTION IS GIVEN TO PROMOTION OF US EXPORTS OF COMPUTERS AND PERIPHERAL EQUIPMENT, PROCESS CONTROL INSTRUMENTATION, CONSUMER GOODS, SECURITY SYSTEMS, AND ENERGY SYSTEMS; TO INCREASED SWISS TOURIST AND BUSINESS TRAVEL; AND TO ASSISTING SWISS INVESTORS TO OBTAIN DIRECT INVESTMENT INFO.

4. SECTION III: CAMPAIGN DEVELOPMENT:

CAMPAIGN 1 - VISIT USA:

POTENTIAL FOR SWISS TRAVEL TO US EXPECTED TO CONTINUE IMPROVEMENT WITH RECOVERY FROM RECESSION AND STABILIZATION OF DOLLAR/SF EXCHANGE RATE. CHARTER FARES COMPARE FAVORABLY WITH THOSE IN ANY OTHER PART OF WORLD.

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(A) ATTEMPT TO ORGANIZE PARTICIPATION BY USTS
AND LARGER TOUR OPERATORS IN COMBINED USA EXHIBITION
AT LAUSANNEE SOLON DE TOURISME, FEB/MAR 1979.

(B) ATTEMPT TO ORGANIZE VISIT USA SEMINAR(S) FOR
COUNTER LEVEL SALES PERSONNEL OF SWISS TRAVEL AGENCIES.

(C) CONTINUE AMBASSADORIAL DIRECT MAIL CAMPAIGN
THROUGHOUT SWITZERLAND TO ENCOURAGE USA TRAVEL.

(D) CONTINUE USTS BROCHURE DISTRIBUTION SERVICE
FROM EMBASSY TO SWISS TAVEL AGENTS

(E) ASSIST LOCAL TOUR OPERATORS AND ASSOCIATIONS
TO ORGANIZE EVENING FILM SHOWINGS WITH MATERIALS AND
ASSISTANCE FROM USTS AND USIA

(F) ASSIST COMMON INTEREST GROUPS SUCH AS SWISS
AERO CLUB AND BERN RESTAURANT OWNERS IN ORGANIZING
GROUP TRIPS TO US.

CAMPAIGN 2 - COMPUTERS AND PERIPHERAL EQUIPMENT:

SWITZERLAND WILL CONTINUE TO RELY HEAVILY ON
US HARDWARE AND SOFTWARE IN DATA PROCESSING EQUIPMENT.
SWISS MARKET FOR HARDWARE MAY REACH \$160 MILLION IN 1979.
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TREND IS TOWARD DISTRIBUTED PROCESSING AND INTELLIGENT SYSTEMS,
WITH EMPHASIS ON NIMIS AND MICROS.

(A) MOUNT EXHIBITION AT INELTEC, ZURICH, SEP 1979.
EXHIBITION WOULD BE COMBINED PLATFORM FOR NEW-
TO- MARKET COMPANIES AND AMERICAN COMPANIES ALREADY IN
SWITZERLAND WHICH WOULD NOT OR COULD NOT ON THEIR OWN
OTHERWISE PARTICIPATE. EXHIBITION WOULD CONSIST OF
THREE PARTS: CATALOG SHOW, BUSINESS INFO CENTER, AND
SMALL EXHIBITION AREA FOR 20-40 FIRMS. EXHIBIT WOULD
BE ORGANIZED BY EMBASSY BERN WITH COMMERCE SUPPORT.
AT LEAST HALF OF EXHIBITING FIRMS WOULD BE RECRUITED
BY EMBASSY IN SWITZERLAND. BUDGET REQUIRED OUTSIDE OF
CATALOG SHOW WOULD BE FULLY FUNDED BY EXHIBITING FIRMS.
INELTEC EXHIBITION WOULD BE INCLUDED AS ACTION UNDER
PROCESS CONTROL, ENERGY SYSTEMS AND SECURITY SYSTEMS
CAMPAIGNS, AND RELATE TO OTHER POST SPECIAL EFFORT
IN LABORATORY AND SEIENTIFIC INSTRUMENTS.

(B) REINFORCE PERSONAL CONTACTS WITH PURPOSE OF
GENERATING 40 TRADE OPPORTUNITIES

(C) SUPPORT PARIS TC SHOW MAR 1979

(D) EVALUATE FEASIBILITY OF HOLDIMG MOCROPROCESSOR
SEMINAR AND EXHIBITION IN SPRING 1979

(E) ATTEMPT TO ORGANIZE FB TRIP TO NATL COMPUTER
CONFERENCE, JUN 1979

CAMPAIGN 3 - CONSUMER GOODS:

ECONOMIC RECOVERY IN SWITZERLAND AND CONTINUED
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FAVORABLE DOLLAR/SF EXCHANGE RATE SHOULD CONTINUE TO
IMPROVE PROSPECTS FOR US CONSUMER GOODS

(A) MEET WITH DEPARTMENT STORE CHAINS TO SUPPORT
NON-FUNDED IN-STORE PROMOTIONS

(B) PROMOTE ATTENDANCE OF SWISS BUYERS AND OTHER EXECUTIVES
AT US EXHIBITION AT COLOGNE HOUSEWARES SHOW, FEB 1979

(C) COORDINATE EFFORTS WITH POSTS IN NEIGHBORING COUNTRIES
TO ORGANIZE FB TRIPS TO NATL HOUSEWARES SHOW IN CHICAGO,
JUL 1979, AND TO NATL HARDWARE SHOW IN CHICAGO, AUG 1979

(D) ENCOURAGE SERIOUS SMALL-MED SIZE TRADE
MISSIONS IN CONSUMER PRODUCTS TO VISIT SWITZERLAND.

(E) EVALUATE POSSIBLE MINI-EXHIBITION IN CONSUMER GOODS IN SWITZERLAND AS OFFSHOOT OF TRADE CENTER OR OTHER USG SPONSORED EXHIBIT IN A NEIGHBORING COUNTRY.

(F) INVESTIGATE SUITABILITY OF OFFICIAL EXHIBITION AT KID 79 (SALON INTL DE L'ENFANCE ET DE LA JEUNESSE), LAUSANNE, MAY 1979, WHICH SPECIALIZES IN WIDE RANGE OF CONSUMER GOODS FOR CHILDREN.

(G) MAINTAIN AND IMPROVE PERSONAL CONTACTS WITH VIEW OF DEVELOPING 80 TRADE OPPORTUNITIES.

CAMPAIGN 4 - INVEST IN USA PROGRAM:

AS PRESIDENT CATER, REFERRING TO DETERIORATING EXCHANGE RATE OF DOLLAR, STATES IN HIS PRESS CONFERENCE ON MAR 2, 1978: QTE...THE ATTRACTIVENESS OF INVESTMENT IN OUR OWN COUNTRY COMPARED TO OTHER NATIONS IS RAPIDLY INCREASING UNQTE. DURING 1976 SWITZERLAND LED ALL OTHER COUNTRIES AS A SOURCE OF DIRECT FOREIGN INVESTMENT IN US. THE SWISS RANK FOURTH IN DIRECT UNCLASSIFIED

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INVESTMENT IN US AFTER THE NETHERLANDS, UK AND CANADA. THE EMBASSY IS INCREASINGLY CALLED UPON BY OFFICERS OF SWISS FIRMS, BOTH LARGE AND SMALL, TO PROVIDE INFO ON ALL ASPECTS OF INVESTING IN US, INCLUDING TAXATION, IMPORT DUTIES, NAMES OF ATTORNEYS, AND SOURCES OF INFO ON INVESTMENT INCENTIVES.

(A) ORGANIZE "STATE DAY" MEETING(S) IN BERN FOR STATE ECONOMIC DEVELOPMENT AGENCY REPS AND POTENTIAL SWISS INVESTORS.

(B) SUPPORT 3-5 VISITS OF STATE TRADE MISSIONS TO SWITZERLAND

(C) ASSIST STATE OFFICES IN EUROPE TO IDENTIFY

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POTENTIAL INVESTORS.

(D) UPDATE FILES ON REGIONAL AND STATE INDUSTRIAL DEVELOPMENT AGENCIES AND ON PROSPECTIVE SWISS INVESTORS.

(E) DEVELOP AND REPORT 20 NEW DIRECT INVESTMENT LEADS.

CAMPAIGN 5 - PROCESS CONTROL INSTRUMENTATION
(INCLUDING POLLUTION CONTROL EQUIPMENT):

SWISS INDUSTRY HAS ENTERED A PERIOD OF RESTRUCTURING WHICH INCLUDES MODERNIZATION OF EXISTING PRODUCTION FACILITIES AS WELL AS INCREASED AUTOMATION TO BALANCE HIGH LABOR COSTS. SUBSTANTIAL INVESTMENTS ARE REQUIRED IN ADVANCED AUTOMATIC PROCESS CONTROLS. ABOUT HALF OF CAMPAIGN EFFORT WOULD BE IN POLLUTION CONTROL EQUIPMENT WHICH REQUIRES ADVANCED WET CHEMISTRY PROCESS CONTROL INSTRUMENTS. OF SPECIAL INTEREST IS TREND TOWARD AUTOMATIC, COMPUTER-CONTROLLED SEWAGE TREATMENT PLANTS.

(A) SUPPORT PARIS TC PROCESS CONTROL EXHIBITION IN MAY 1979.

(B) ATTEMPT TO ORGANIZE 10-DAY FB TRIP FOR SWISS AUTOMATION INDUSTRY TO US FOR PLANT VISITS AND SEMINAR IN FALL 1978 OR UNCLASSIFIED

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SPRING 1979 WITH COMMERCE ASSISTANCE.

(C) SEE INELTEC IN CAMPAIGN 2

(C) REINFORCE PERSONAL CONTACTS TO DEVELOP 32 TRADE OPPORTUNITIES

CAMPAIGN 5 - SECURITY SYSTEMS:

THE MARKET FOR ADVANCED SECURITY EQUIPMENT HERE IS ENTERING PERIOD OF BOOM. BANKS AND SWISS PTT PLAN TO EQUIP OFFICES WITH NEWEST SYSTEMS IN VIEW OF RISE IN NUMBER OF ARMED ROBBERIES. INVESTMENTS BY THESE

TWO ORGANIZATIONS EXPECTED TO BE \$200 MILLION DURING 1977-79. 15 PCT OF TOTAL EXPECTED TO GO INTO ALARM SYSTEMS, REMAINDER INTO BULLET-PROOF GLASS AND OTHER BUILDING CONVERSION. RESIDENTIAL MARKET IS GROWING, WITH CUSTOMERS ESTIMATED AT 100,000 OR MORE DURING NEXT 3-5 YEARS. SWISS ARMY AND POLICE PLAN TO IMPROVE EXISTING SECURITY SYSTEMS.

(A) SEE INELTEC IN CAMPAIGN 2

(B) SUPPORT VISIT TO SWITZERLAND OF HIGH-LEVEL SECURITY EQUIPMENT TRADE MISSION IN MAR 1979

(C) SUPPORT SWISS ATTENDANCE AT SECURITY EQUIPMENT EXHIBITION AT PARIS TC.

(D) DEVELOP 24 TRADE OPPORTUNITIES

(E) POST WILL CONDUCT MARKET RESEARCH OF SECURITY EQUIPMENT MARKET IN SWITZERLAND

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CAMPAIGN 7 - ENERGY SYSTEMS:

SWISS GOVT IS PLACING INCREASED EMPHASIS ON DEVELOPMENT OF SOLAR ENERGY AS AN ALTERNATIVE ENERGY SOURCE. PAST OFFICIAL SUPPORT WAS LIMITED TO FINANCING SF 2 MILLION IN RESEARCH, BUT THIS AMOUNT IS EXPECTED TO INCREASE DRAMATICALLY. PRIVATE INDUSTRY ALSO STEPPING UP RESEARCH. FY 79 WILL BE OPPORTUNE TIME FOR US TECHNOLOGICAL LEADERS IN SOLAR ENERGY FIELD TO OFFER SUPERIOR PRODUCTS AT SWISS EXHIBITIONS AND FOR EMBASSY TO INTENSIFY CONTACTS WITH APPROPRIATE GOVT AGENCIES, INDUSTRY ASSNS AND PRIVATE FIRMS.

(A) SEE INTELTEC IN CAMPAIGN 2

(B) KEEP COMMERCE INFORMED OF EXPECTED OPPORTUNITY FOR US FIRMS WITH HIGH TECHNOLOGY SOLAR ENERGY PRODUCTS TO PARTICIPATE DIRECTLY IN SPECIAL SOLAR ENERGY PAVILION/ SEMINAR AT INELTEC.

(C) SUPPORT FB TRAVEL TO SPECIALIZED US EVENTS IN SOLAR ENERGY FIELD

(D) DEVELOP 8 TRADE OPPORTUNITIES.

(E) PROVIDE SUPPORT FOR US EXHIBIT AT NUCLEX 78, BASEL, OCT 1978

5. OTHER SPECIAL POST EFFORTS:

OSPEC 1: EXPORTER/IMPORTER MEETINGS: POST BELIEVES THAT THE
CURRENT LOW VALUE OF THE DOLLAR RELATIVE TO

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SF IS IDEAL OPPORTUNITY FOR AMERICAN MANUFACTURERS
OF PRODUCTS OUTLINED IN CAMPAIGNS AND OSPECS TO BREAK
INTO EUROPEAN MARKET. BASED ON EXPERIENCE TO BE GAINED
AT MAY 1978 MEETING IN BERN, POST EXPECTS ORGANIZE
ONE OR MORE MEETINGS OF AMERICAN MANUFACTURERS OR EXPORT
AGENTS WITH SWISS IMPORTERS LOOKING FOR SOURCES OF SUPPLY
IN US. POST WILL SECURE ATTENDANCE OF SWISS AND CALL UPON
COMMERCE TO ASSIST IN PROMOTING ATTENDANCE FROM US.

OSPE 2: AMERICAN BUSINESS COMMUNITY: POST BELIEVES THAT
AN ALL-OUT EFFORT SHOULD BE MADE TO MAXIMIZE SUPPORT OF
US BUSINESS COMMUNITY IN SWITZERLAND.

(A) ORGANIZE MEETINGS OF AMBASSADOR AND EMB
OFFICERS WITH AMERICAN BUSINESS COMMUNITY IN SWITZERLAND
AT LEAST TWICE DURING FY 79 FOR PURPOSE OF FACILITATING
COMMUNICATION AND AIRING PROBLEMS.

(D) DEVELOP REGULAR BULLETIN TO BE SENT TO
600-800 AMERICAN FIRMS IN SWITZERLAND

(C) EVALUATE OFFICIAL PROMOTION SCHEDULE IN
SWITZERLAND WITH VIEW TO ASSISTING FIRMS ALREADY
REPRESENTED AND/OR PRESENT IN SWITZERLAND (INELTEC
AND MICROPROCESSOR SEMINAR IN CAMPAIGN 1).)
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OSPE 3: HEALTH CARE EQUIPMENT AND SUPPLIES:

FY 79 SWISS MARKET FOR BIOMEDICAL EQUIPMENT IS ESTIMATED AT \$45 MILLION, WITH US EXPECTED TO HOLD 17 PCT OF MARKET SHARE. EMBASSY EFFORTS WOULD EXPLOIT EXISTING OPPORTUNITIES FOR SOPHISTICATED ITEMS SUCH AS DIAGNOSTIC EQUIPMENT AND RADIOLOGICAL AND ULTRASONIC EQUIPMENT.

(A) ORGANIZE FB TRIP TO AMERICAN HEART ASSN CONVENTION AND EXHIBITION IN DALLAS, NOV 1978.

(B) ORGANIZE FB TRIP TO RADIOLOGICAL SOCIETY OF NORTH AMERICAN CONVENTION AND EXHIBITION IN CHICAGO, NOV 1978. COORDINATE EFFORTS WITH EMBASSY VIENNA.

(C) DEVELOP 12 TRADE OPPORTUNITIES

OSPE 4 - ELECTRONIC COMPONENTS:

US HAS CLEAR TECHNOLOGICAL ADVANTAGE. US SEMICONDUCTOR FIRMS HOLD 75 PCT OF SWISS MARKET. MARKET IN INDUSTRIAL ELECTRONICS, SWISS MACHINERY AND INSTRUMENTS INDUSTRY, AND IN WATCH INDUSTRY DESERVE SPECIAL EFFORTS.

(A) DEVELOP 20 TRADE OPPORTUNITIES.

(B) ENCOURAGE COMMERCE TO SUBMIT AT LEAST 20 ADS.

OSPE 5 - LABORATORY AND SCIENTIFIC INSTRUMENTS:

MODERNIZATION OF EXISTING PRODUCTION FACILITIES IN SWITZERLAND CONTINUES TO CREATE SUBSTANTIAL DEMAND
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FOR LABORATORY INSTRUMENTS FOR REASONS DISCUSSED UNDER PROCESS CONTROL INSTRUMENTATION CAMPAIGN.

(A) DEVELOP 10 TRADE OPPORTUNITIES

(B) ENCOURAGE COMMERCE TO SUBMIT AT LEAST 10 ADS.

(C) SUPPORT SELECTED TC AND US TRADE SHOWS.

OSPE 6 - CHEMICAL RAW MATERIALS

ASSUMING CONTINUING FAVORABLE DOLLAR/SF RELATIONSHIP, SWITZERLAND WILL CONTINUE TO LOOK TO US FOR CHEMICAL RAW MATERIALS AND INTERMEDIATES. THERE IS GROWING SWISS INTEREST IN AMERICAN PHARMACEUTICAL SPECIALITIES, OVER-THE-COUNTER PHARMACEUTICALS, AND COSMETICS. SWISS DISTRIBUTORS OF RAW MATERIALS AND INTERMEDIATES OFTEN IMPORT COSMETICS AND PHARMACEUTICALS.

(A) DEVELOP 8 TRADE OPPORTUNITIES

(B) ENCOURAGE COMMERCE TO SUBMIT AT LEAST 4 ADMSS.

OSPE 8 - PUBLICATIONS

EMBASSY WILL CONTINUE TO PUBLISH A QUARTERLY COMMERCIAL NEWSLETTER EMPHASIZING SUPPORT OF CCP CAMPAIGNS AND ACTIVITIES.

(A) CONTINUOUS EFFORT WILL BE MADE TO IMPROVE APPEARANCE AND REDUCE COST PER COPY IN ORDER TO INCREASE PRESENT CIRCULATION OF APPROX 2000.

(B) RESPONSE CARD WILL BE INCLUDED IN ONE ISSUE WHICH WILL REQUIRE READERS TO RENEW THEIR SUBSCRIPTION.
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